

BRIEF

UKRAINE'S STRATEGY &
WESTERN MILITARY
ASSISTANCERUSSIA'S WAR IN UKRAINE SERIES 2
NO. 8

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International partners have provided significant military assistance to Ukraine since the start of Russia's full-scale invasion in February 2022. The temporary suspension of critical US military assistance in early 2025 raised concerns about Ukraine's strategy to fend off Russia. While it is difficult to predict how the battlefield will unfold in 2025, strong ties with Western partners will be crucial to continue a war of attrition against an overwhelming enemy.

In 2024, Ukraine still hoped to implement a staged strategic plan that would allow it to stabilise the situation on the front lines, seize the initiative and launch counter-offensive operations. For this, stable international military support would be a prerequisite.¹ However, Western military assistance slowed significantly for reasons that included partners' disappointment with Ukraine's unsuccessful counter-offensive in 2023, the depletion of weapons stocks, and the slow development of defence production in Europe. The political season in the US also threatened the continuity of US military assistance.

The unreliability of external military support and internal problems in generating manpower for the battlefield forced Ukraine to adopt a stabilisation strategy that strongly emphasised attrition of the enemy

The unreliability of external military support and internal problems in generating manpower for the battlefield forced Ukraine to adopt a stabilisation strategy that strongly emphasised attrition of the enemy. The key changes included:

- Putting partners' support on a long-term basis through bilateral security agreements (27 signed by 2024) and 8 multilateral capability coalitions under the Ukraine Defence Contact Group (UDCG – 'Ramstein format').
- Developing and multiplying unmanned and electronic warfare technologies. Currently, 50-70% of damage to the enemy is inflicted by Uncrewed Aerial Vehicles (UAV).
- Strengthening the self-sufficiency of the Ukrainian defence industrial base. According to various official estimates, by the end of last year, Ukraine was producing more than 30-40% of the weapons, equipment and ammunition it needed.²
- Mass production of missiles and drones capable of destroying targets more than 1 700 km behind enemy lines. In 2024, 377 military targets were hit in a series of coordinated strikes in Russia.³
- Improving the integrated air and missile defence system through the expansion of donated ground and air components, including F-16 fighter jets.

Despite fighting an enemy superior in manpower and equipment, Ukraine has clearly demonstrated the efficiency of its current strategy of attrition. According to expert estimates, Ukraine lost about 3 600 square kilometres of territory in 2024.⁴ In the same year, the Armed Forces of Ukraine inflicted approximately 431 000 casualties (more than Russia's total casualties in 2022-23) meaning that Russia lost 120 soldiers—the size of a Russian motorised rifle company—for every square kilometre it captured. Russia's total

losses equate to roughly 36 motorised rifle divisions. It also lost approximately 119 tank battalions (almost 3 700 tanks), and 725 artillery divisions (about 13 000 artillery systems).⁵

UKRAINE'S 2025 STRATEGY

Russia's strategic goal in 2025 remains unchanged: to destroy Ukraine and its sovereignty. It continues to build up long-range strike capabilities, increase its military contingent in Ukraine, and create significant strategic reserves. The Kremlin's imitation of a negotiation process is intended only to strengthen its hybrid influence on Ukraine's partners and to reduce their support for Kyiv.

Ukraine is thus proceeding from the baseline assumption of continued intense combat operations on Ukrainian territory, and further terrorist acts against the civilian population. In 2025, its strategic goal is to stabilise the frontline, with priority given to preserving the lives and health of military personnel. The efficiency of the army's command and control, the quality of personnel training, and the expansion of innovation and military technologies will be key.⁶

In 2024, Ukraine took unpopular steps to address the shortage of military personnel, especially in the infantry, by strengthening mobilisation rules. The Army started the transition from temporary command structures to a permanent corps system to enhance the efficiency of military command.⁷ And in February 2025, on the initiative of the President, the 'Line of Drones' initiative was launched to scale up effective UAV solutions and protect Ukrainian infantry in the combat zone.⁸

Strengthening air and sea control, and the development of capabilities to respond asymmetrically to enemy attempts to prevail through overwhelming numbers of troops, military equipment and ammunition are also critical to Ukraine's defence.⁹ To exhaust and deter the enemy, Ukraine will continue to build stockpiles of long-range weapons. President Zelenskyy has tasked manufacturers to produce at least 30 000 long-range drones and 3 000 cruise missiles.¹⁰

The mass production of ground, sea and air unmanned platforms to ensure Ukraine's technological dominance on the battlefield is

another strategic priority. In 2024, Ukraine manufactured 2.2 million First Person View drones and 100 000 long-range UAVs.¹¹ The domestic capacity to produce UAVs of various types is estimated at around 4.5 million units, although this is highly dependent on funding.

The further development of Ukraine's defence industrial base is essential to generating these capabilities. Ukraine has recreated its own defence industrial base, boosting production volumes by more than 20 times in 2023-2024. Ukrainian production of artillery systems has tripled, armoured personnel carriers increased fivefold, anti-tank weapons doubled, and ammunition increased 2.5 times.¹² In 2024, of the 1,300 samples of weapons and military equipment allowed by the MoD into service, 75% were manufactured in Ukraine.¹³ The official target is for production volumes to reach 50% by 2025.¹⁴

The further development of Ukraine's defence industrial base is essential to generating new military capabilities

In the same year, the total capacity of the Ukrainian defence industry could reach €30 billion, but the Ukrainian government will only be able to finance half of this. The state budget allocates approximately €48.5 billion for the defence sector—more than 26% of GDP. Approximately €16.5 billion will be spent on military equipment, both through the purchase of weapons abroad, and investment in the domestic defence industry.¹⁵ There is considerable demand for foreign investment and joint ventures with the Ukrainian defence industry.

INTERNATIONAL PARTNERS

Despite the impressive development of its military-industrial potential, Ukraine remains heavily dependent on international military assistance. The search for arms and ammunition abroad has become a top priority for Ukraine's political and diplomatic leadership, who are exploring all possible bilateral and multilateral initiatives: bilateral agreements, regional and international coalitions, international organisations. In 2025, Ukraine's most pressing

requests of partners will remain the strengthening of air and missile defence systems, the development of the air component, the supply of artillery shells, the development of long-range capabilities, the expansion of drone production and the provision of modern military equipment. Ukraine also counts on partners to train personnel and maintain military hardware.

For Ukraine, it is very important to receive assistance from both the EU and US. The US pledged \$50 billion in 2024, and already \$21 billion during the UDCG meeting in April 2025. Concerns arose in March 2025, however, when the US abruptly stopped its intelligence and arms support, revealing Kyiv's strategic dependence on critical elements such as air defence and satellite imagery. The US-Ukraine agreement on natural resources, signed on 30 April 2025, gives Ukraine some hope of continued support, both pledges from the previous US administration and new military supplies, namely air defence systems.

Western partners should expand their thinking to fully implement a 'peace through strength' approach, giving Ukraine enough resources for counter-offensive operations and long-range deterrence

The EU plays a crucial role, including in the delivery of 155mm artillery shells, and the transfer of windfall profits from immobilised Russian assets. The Commission's spring 2025 White Paper also emphasises assistance to Ukraine, but some EU instruments and proposals, for example High Representative Kaja Kallas' initiative on a multibillion plan for military support, have been blocked by Hungary or other Member States.

CAPABILITY COALITIONS

On 26 April 2025, the UDCG celebrated its third anniversary with almost \$170 billion in military aid pledges to Ukraine.¹⁶ In 2024, the Group had initiated its capability coalitions approach, each coalition covering a thematic core area of military cooperation. As of March 2025, there nine coalitions related to: air force; maritime; integrated air and missile defence; artillery; armoured vehicles and manoeuvrability; drones;

IT; demining; and electronic warfare. Coalitions coordinate support, including weapons delivery, personnel training, and maintenance. Moreover, in January 2025, eight roadmaps were adopted to support Ukraine's strategic goals to 2027.

The NB8 + Ukraine format, meanwhile, serves as a benchmark for regional cooperation, with the Nordic and Baltic countries providing around \$26 billion in assistance to Ukraine. These countries are among the leaders in terms of the share of GDP devoted to assistance to Ukraine and Ukraine benefits from the 'Danish model' (which involves governments financing Ukrainian defence enterprises) for purchasing weapons. Governments including Denmark, Sweden, Iceland, Norway, and Canada, contribute to this investment scheme.

CONCLUSIONS

Military assistance to Ukraine goes far beyond traditional notions of the direct supply of weapons from partner countries' arsenals. Providing financial assistance and investment to support the Ukrainian defence industry is another important contribution, as is strengthening and maintaining sanctions against Russia, where G7 solidarity is essential.

In the medium term, Ukraine will continue to pursue a defence strategy based on technological solutions and asymmetric responses that aim to bleed the enemy dry. Kyiv will focus on the further domestication of military production, which could reach 60-65% in two to three years. While Ukraine still needs a lot of off-the-shelf military equipment, it is more important strategically to increase the financing of its defence industry. Various options are available, including the 'Danish model' of investment, and joint ventures. Money is also essential to keep the 'Czech initiative' on ammunition going.

Here the best approach would be for Western partners to follow the Estonian proposal of dedicating 0.25% of GDP to support Ukraine. Another source would be to make Russian frozen assets work for the Ukrainian defence industry. The best format, meanwhile, for supporting Ukraine is the coalition approach, where interested participants are grouped by topic and

share the burden and roles. The development of military capability coalitions also has significant potential as a long-term tool for planning Ukraine's defence capabilities, especially if combined with the EU's new defence industrial policies and instruments.

Above all, though, the level of partner support for Ukraine determines its window of opportunity on the future battlefield. Western partners should expand their thinking to fully implement a 'peace through strength' approach, which might also envisage giving Ukraine enough resources for counter-offensive operations and long-range deterrence.

ENDNOTES

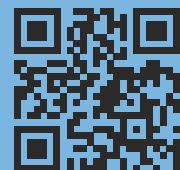
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ISSN 2228-2076